

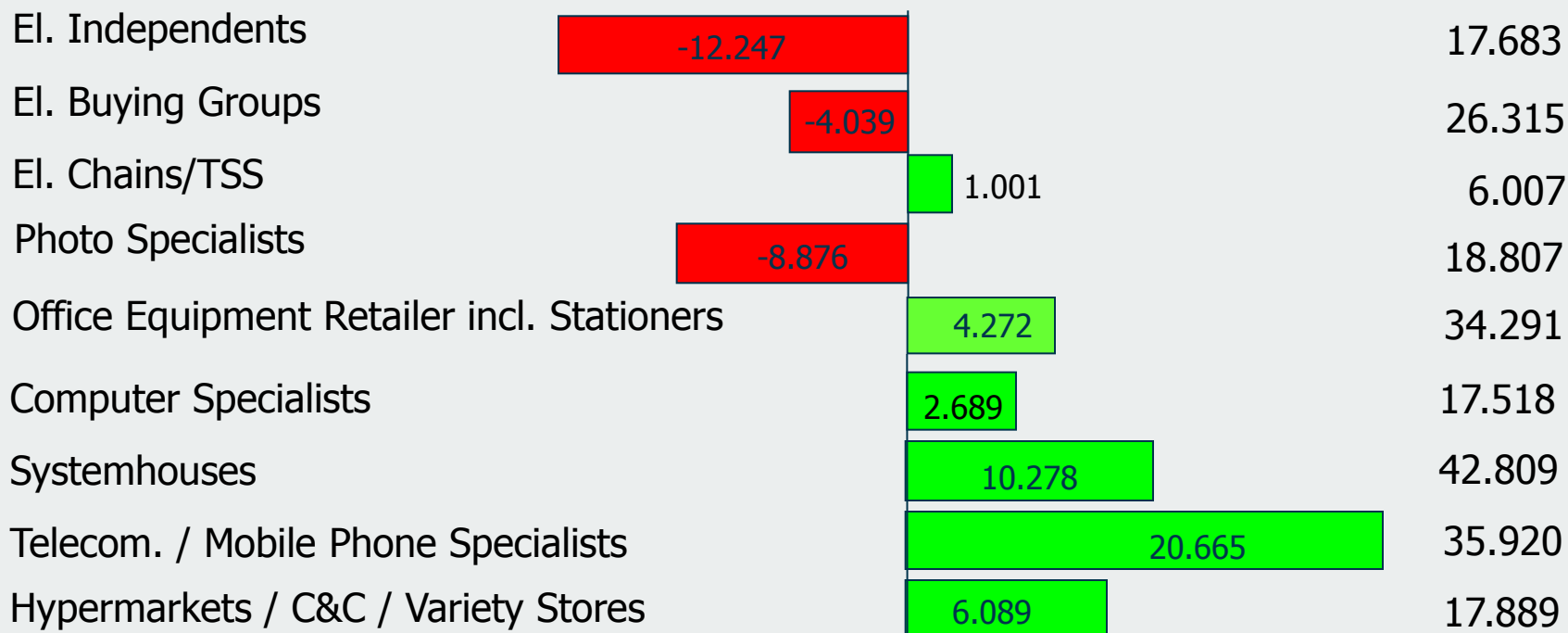


International Retail Trends 2009

Ciprian Hatneanu

Western Europe ^{1.)} Universes - Number of Outlets 1998/2009

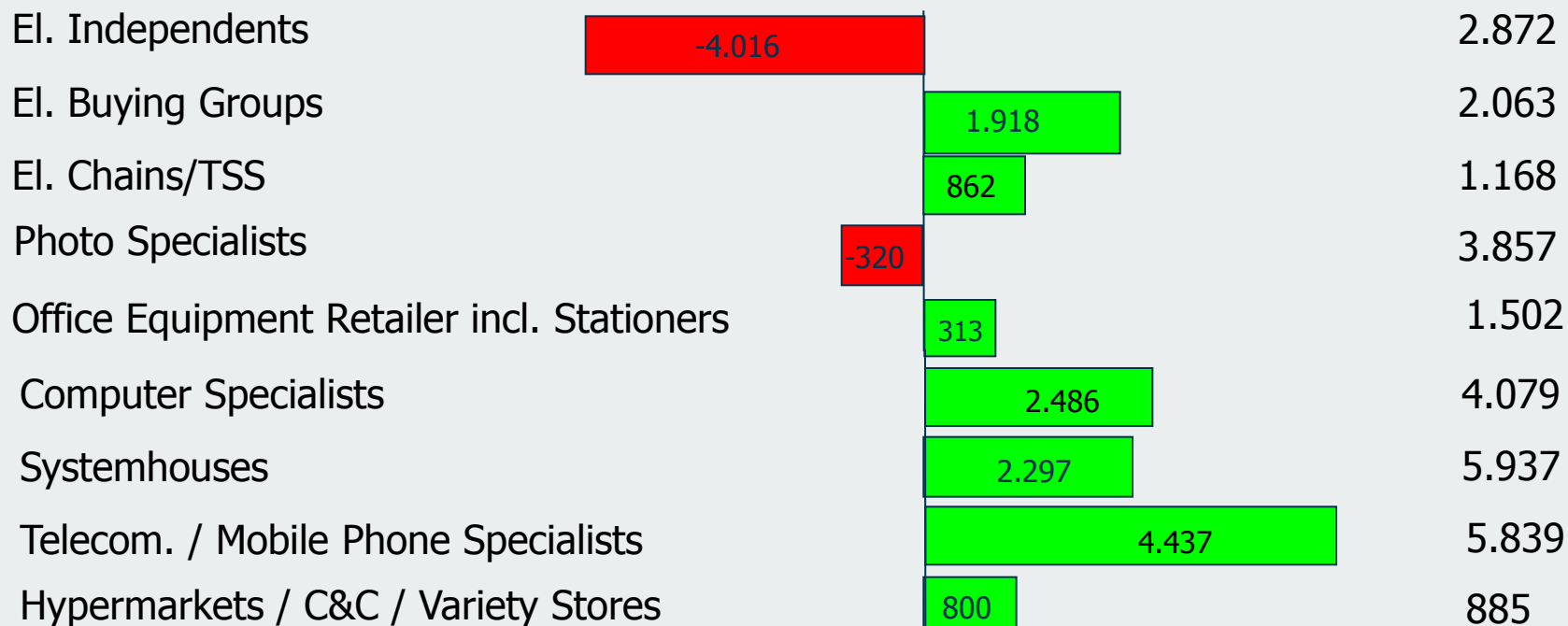
+ 19.832 new traditional Outlets



Eastern Europe ^{1.)}
1998/2009

Universes - Number of Outlets

+ 7.541 new traditional Outlets



Changing Universes and Retail Structures: 1998 vs. 2009

Western Europe¹⁾: + 19.832 new traditional Outlets



CEE²⁾: + 7.541 new traditional Outlets



Western Europe¹⁾: + ~ 10.300 B2C Online Shopping Websites

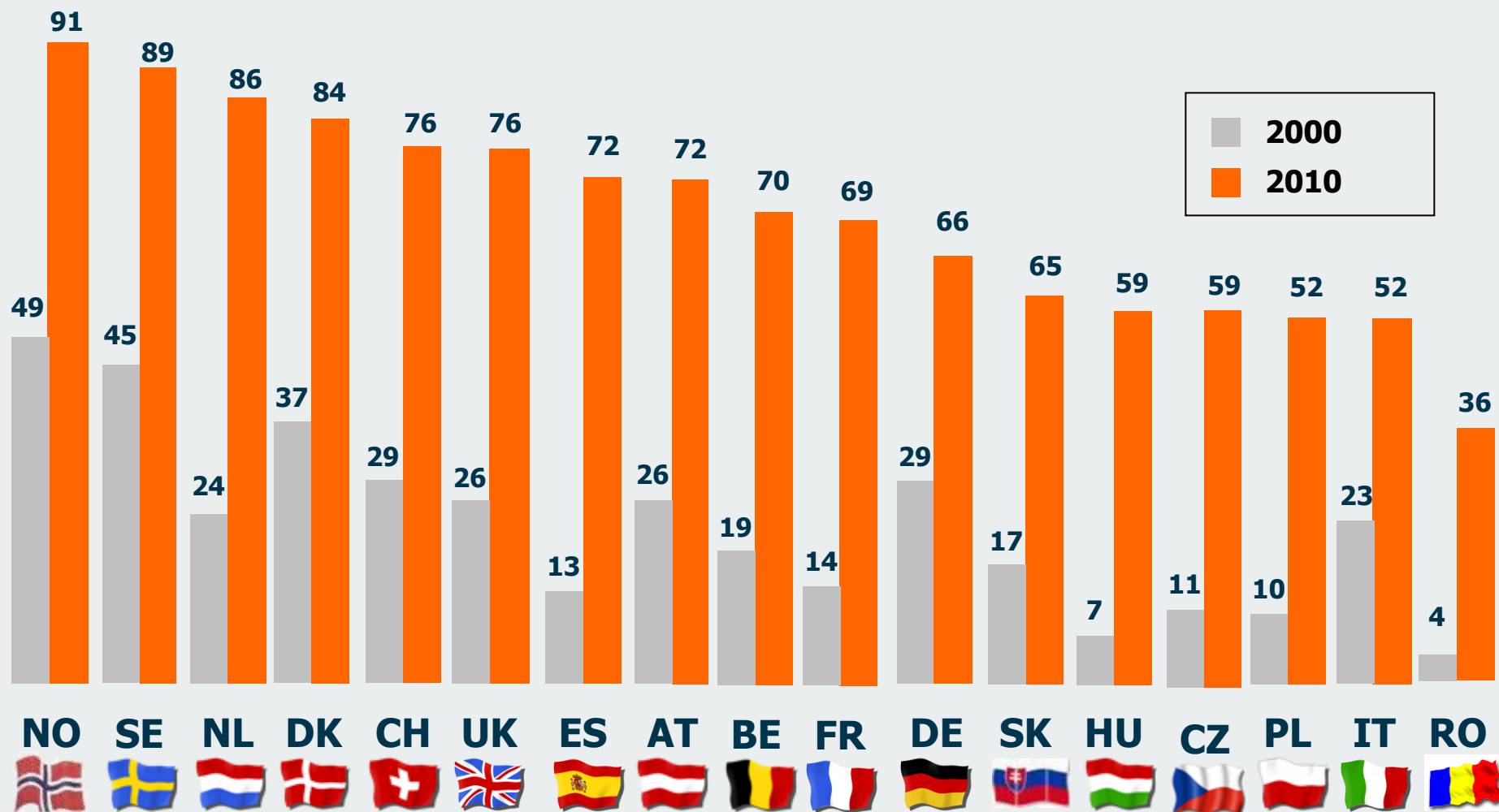


Sorry NO

INTERNET Today

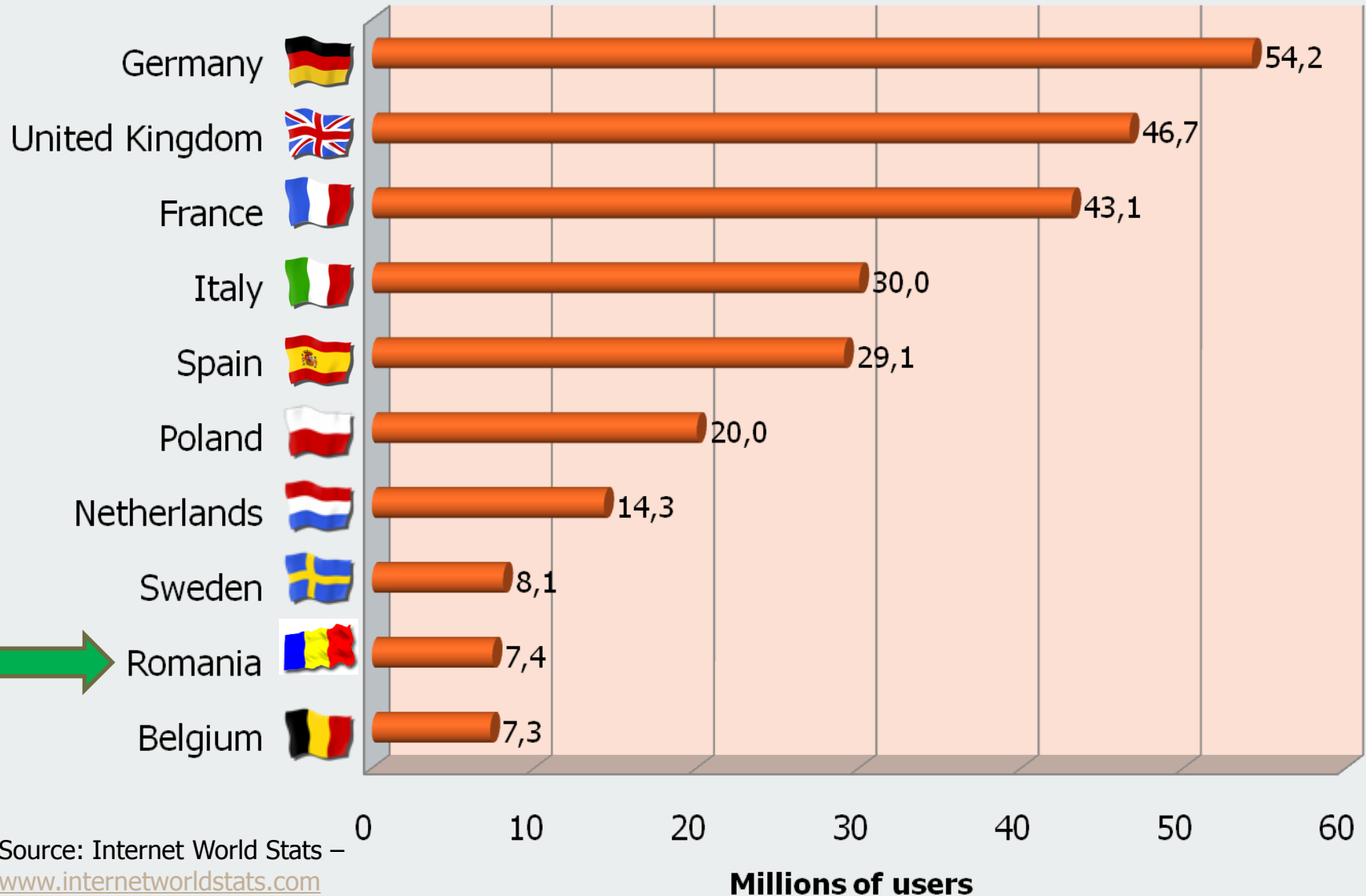


Internet Penetration % of Population 2010/2000



European Union – Top 10 Internet Countries

8



Source: Internet World Stats –

www.internetworldstats.com

Estimated Internet users for September 2009

Millions of users

Definitions and Reporting

9

Traditional Sales

Brick&Mortar Retailers



Click&Mortar Traditional Sales

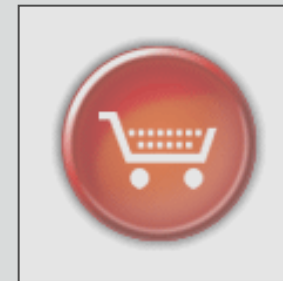


Internet Sales

Click&Mortar Online Sales



Pure Players



offline

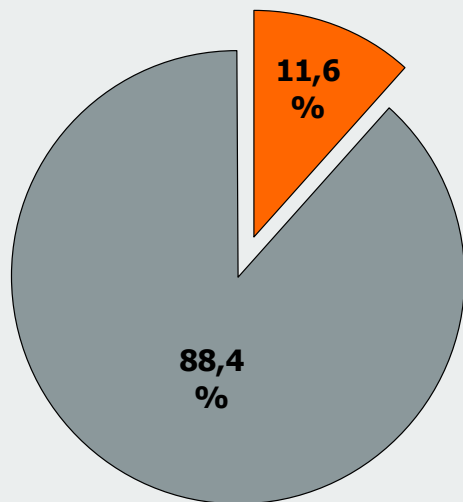
online

11 Countries Europe¹

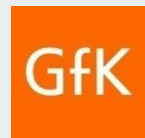
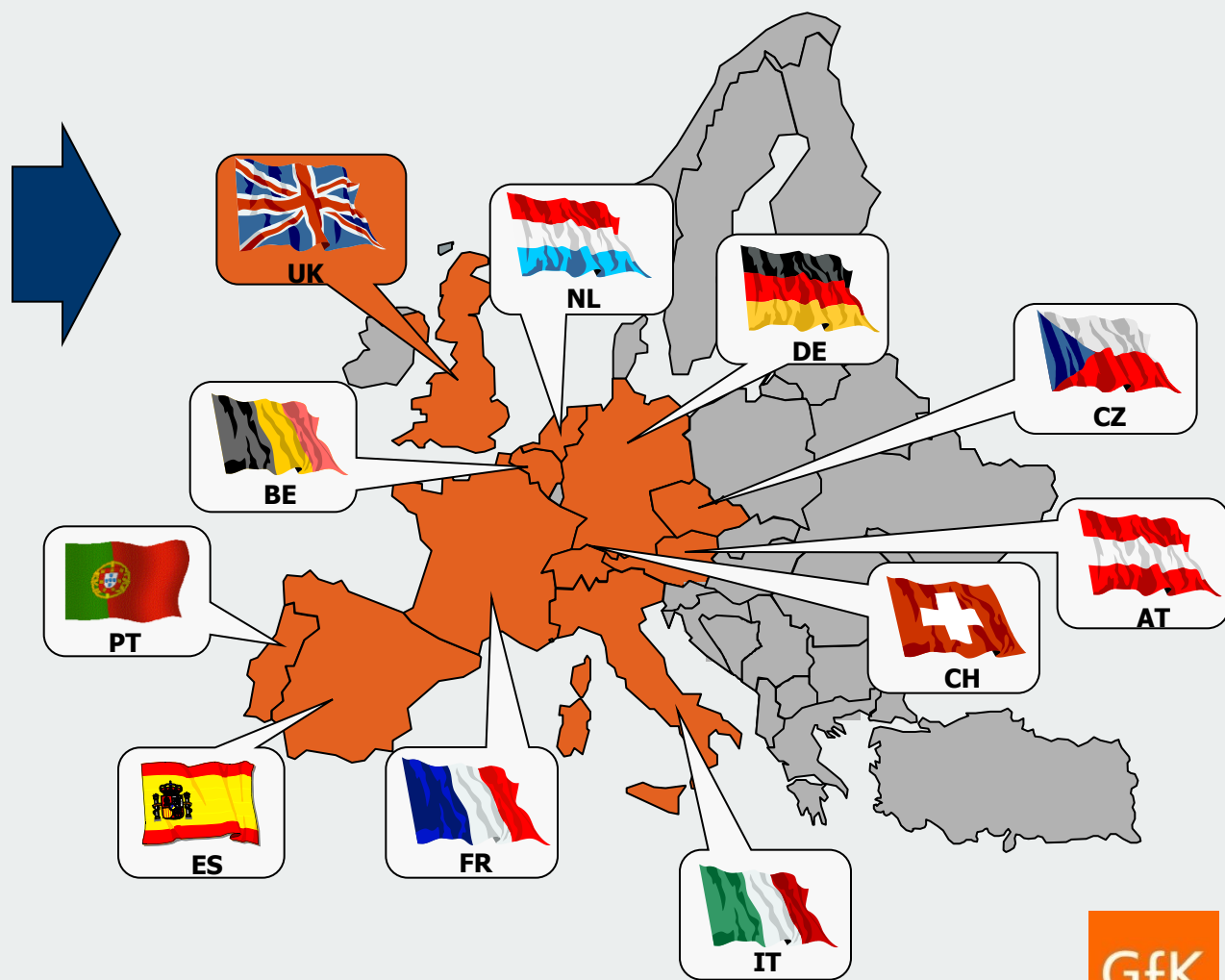
Sales Value % / Jan-Dec 2009

Technical Consumer Goods²

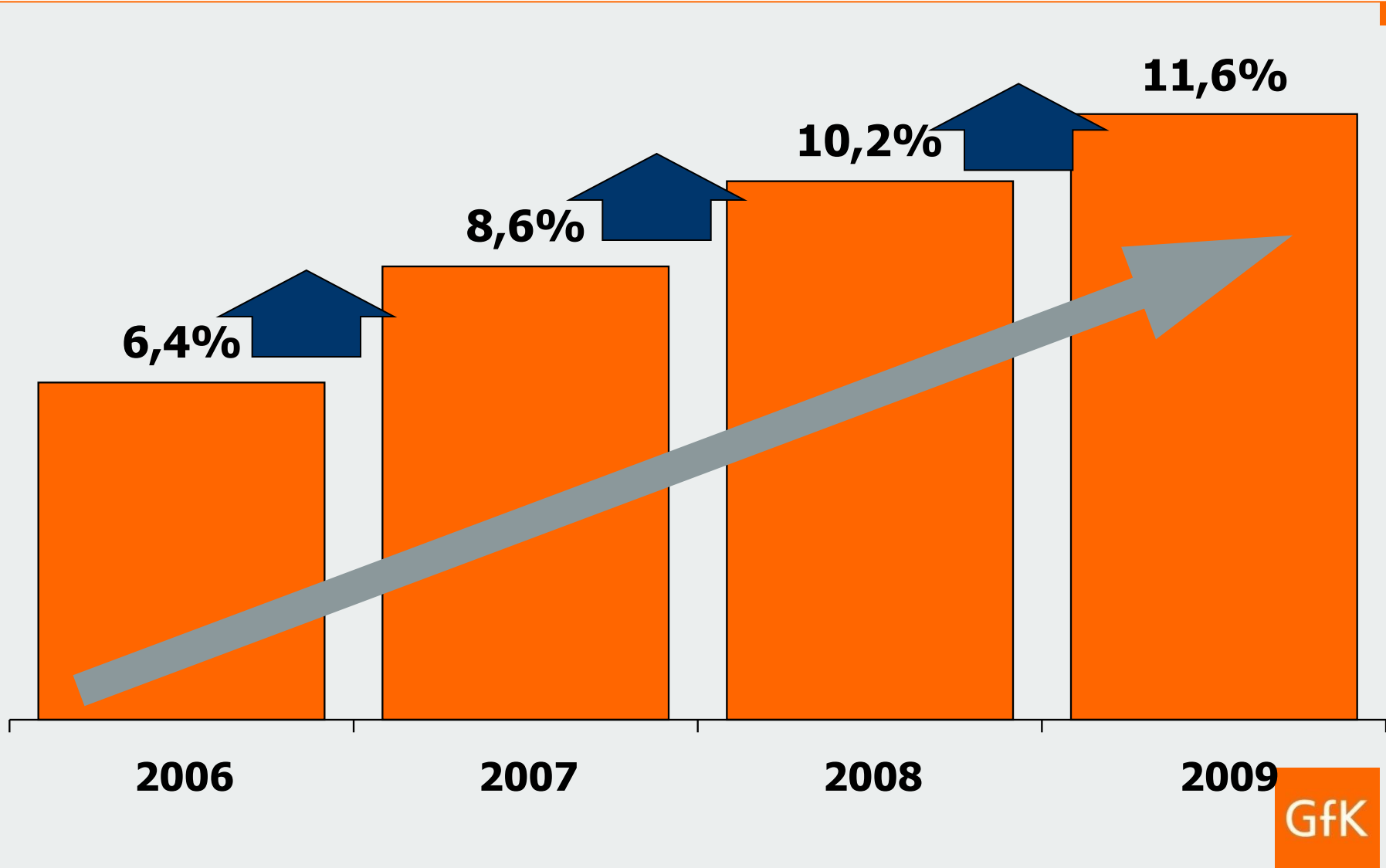
Internet Sales B2C – Countries



■ Internet Sales ■ Traditional Sales
Jan-Dec 2009



Massively Growing B2C Internet Sales-Share for TCG in Europe

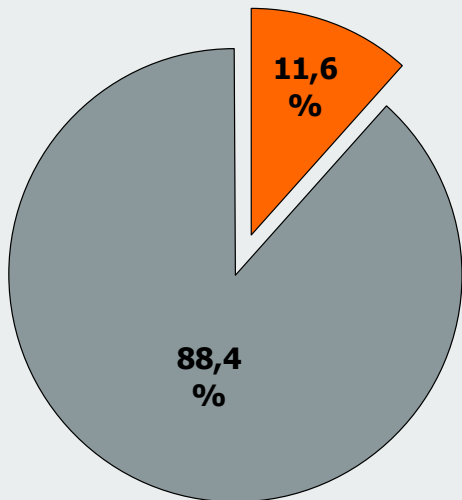


11 Countries Europe¹

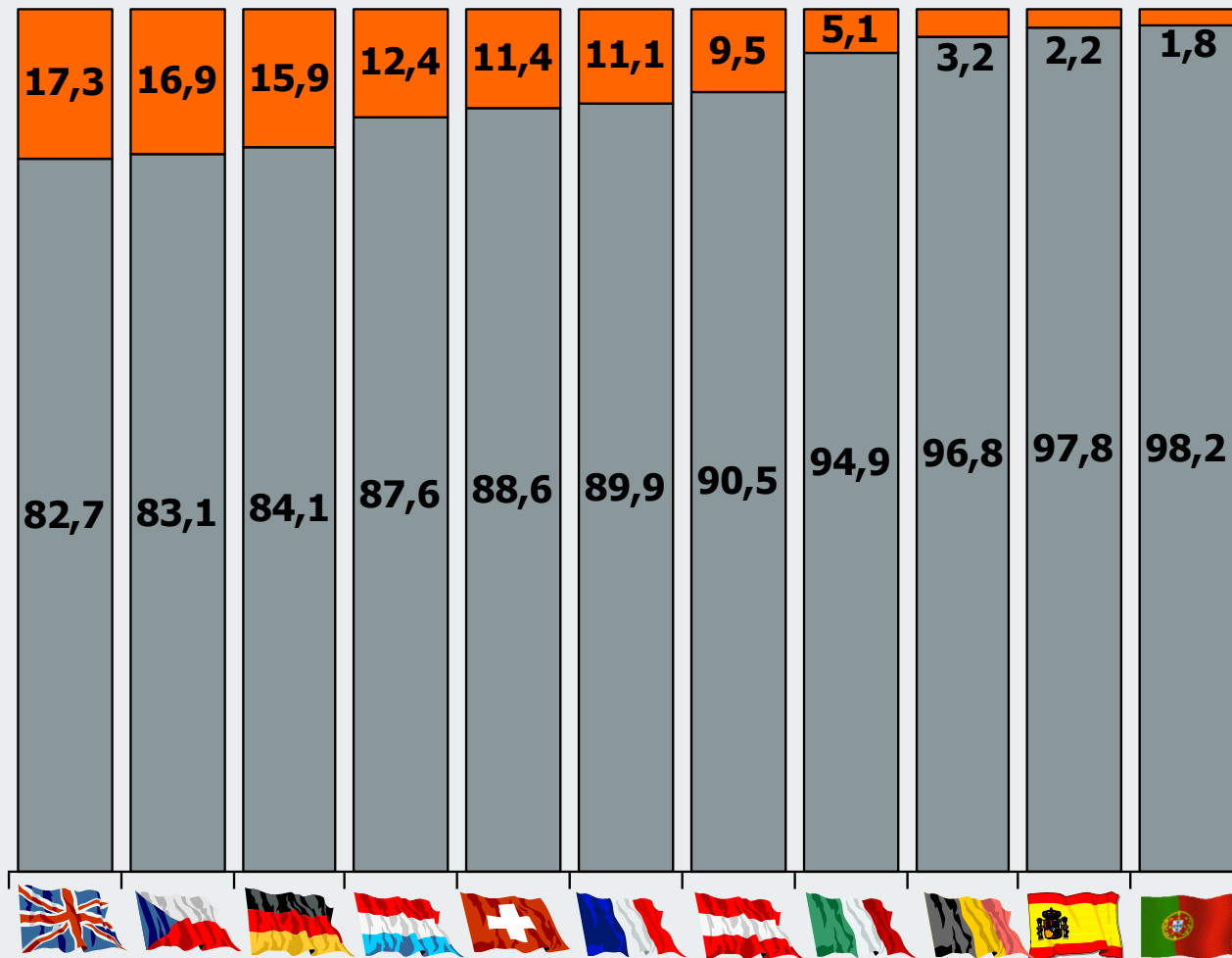
Sales Value % / Jan-Dec 2009

Technical Consumer Goods²

Internet Sales B2C – Shares



■ Internet Sales
 ■ Traditional Sales
Jan-Dec 2009



Total Sales Ranking Internet

- 2.**
- 1.**
- 4.**
- 3.**
- 5.**

Source: GfK RT Retailpanel

1.) AT, BE, CH, CZ, DE, ES, FR, IT, NL, PT, UK

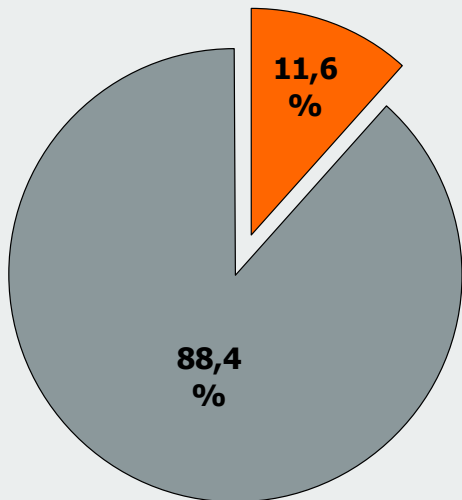
2.) CE, MDA, SDA, TC, IT, OE, Photo, MTG

11 Countries Europe¹+Romania

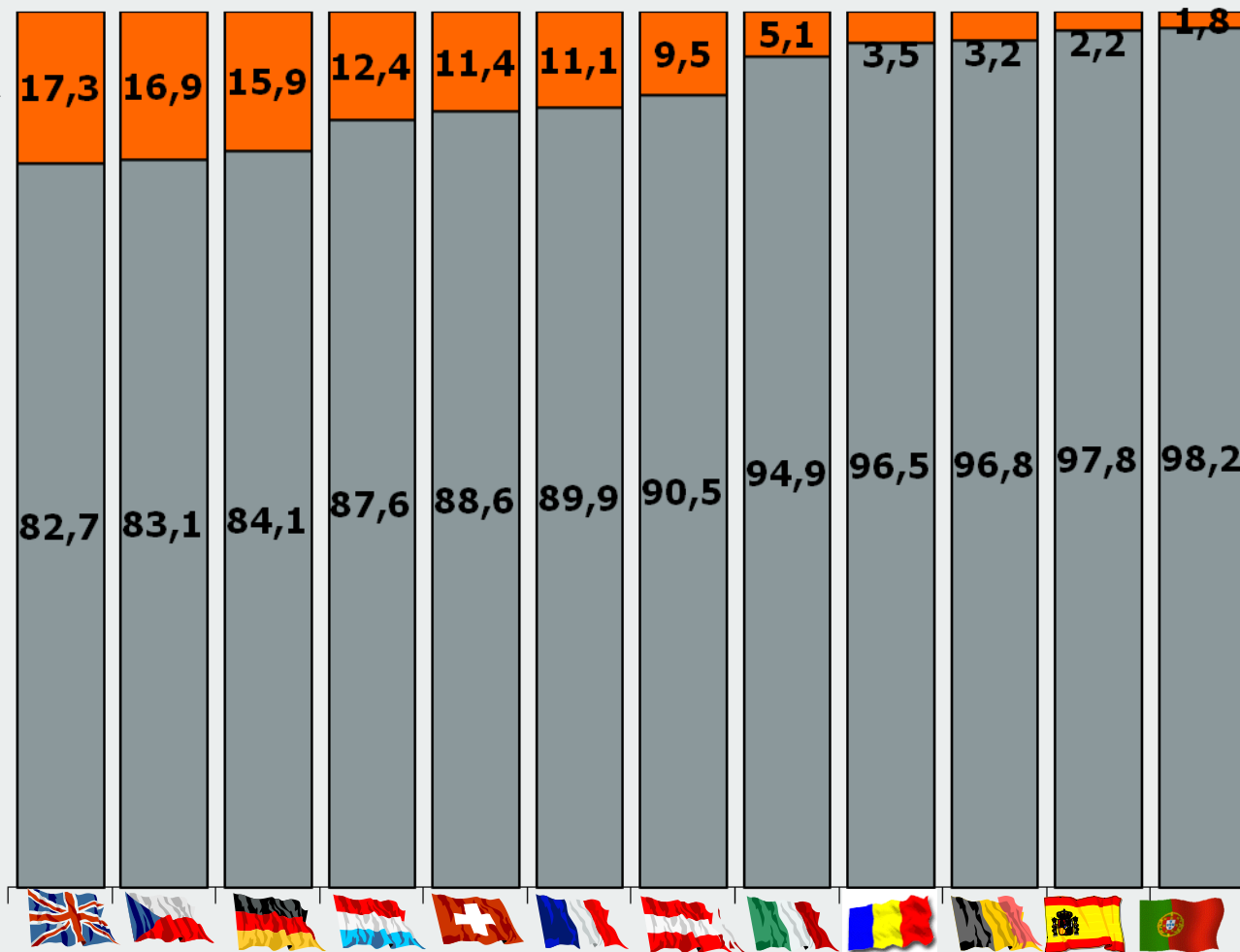
Sales Value % / Jan-Dec 2009

Technical Consumer Goods²

Internet Sales B2C – Shares



■ Internet Sales
 ■ Traditional Sales
Jan-Dec 2009



Total Sales Ranking Internet

- 2.**
- 1.**
- 4.**
- 3.**
- 5.**

Source: GfK RT Retailpanel

1.) AT, BE, CH, CZ, DE, ES, FR, IT, NL, PT, UK

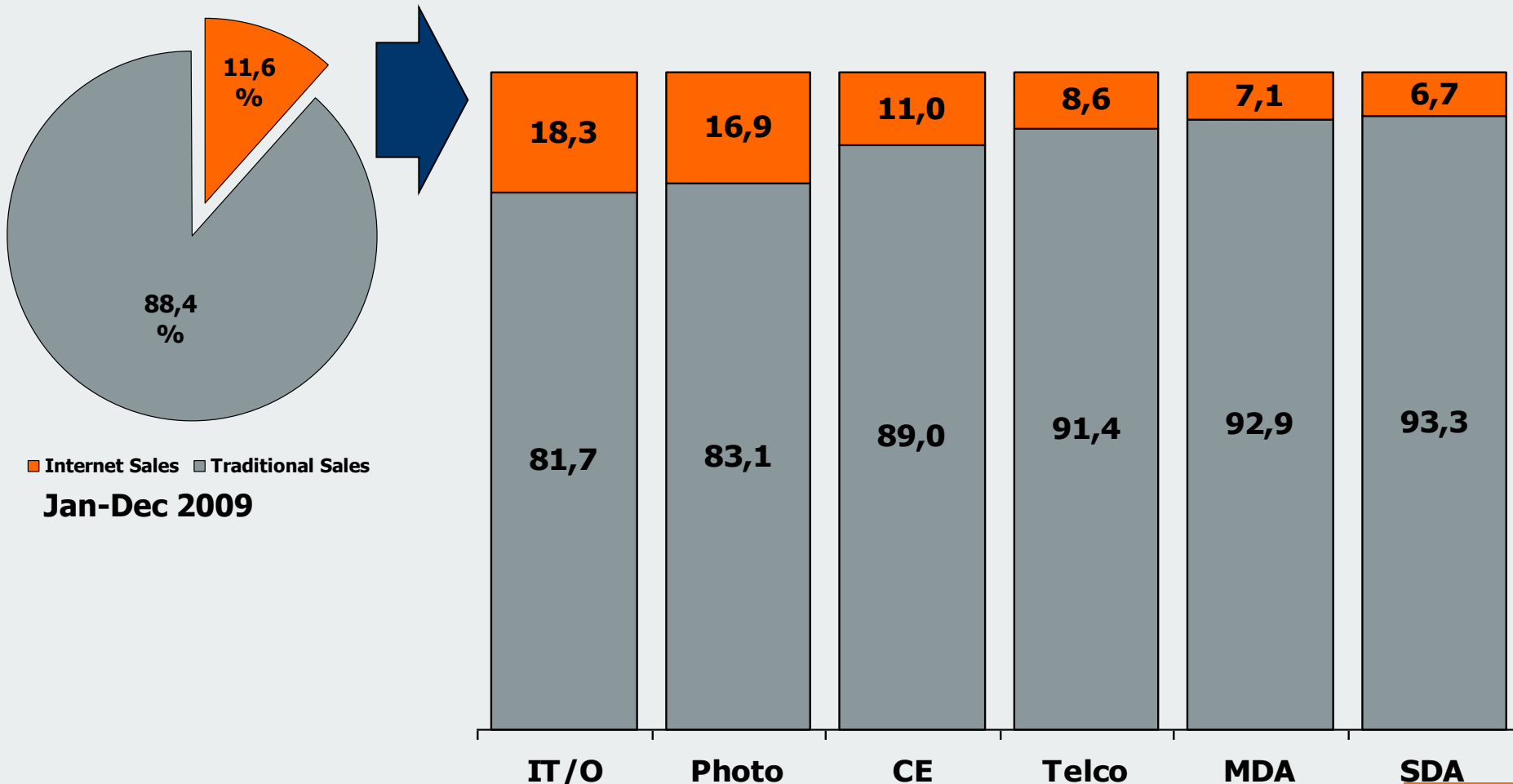
2.) CE, MDA, SDA, TC, IT, OE, Photo, MTG

11 Countries Europe¹

Sales Value % / Jan-Dec 2009

Technical Consumer Goods²

Internet Sales B2C – Shares



■ Internet Sales
 ■ Traditional Sales
Jan-Dec 2009



Source: GfK RT Retailpanel

1.) AT, BE, CH, CZ, DE, ES, FR, IT, NL, PT, UK

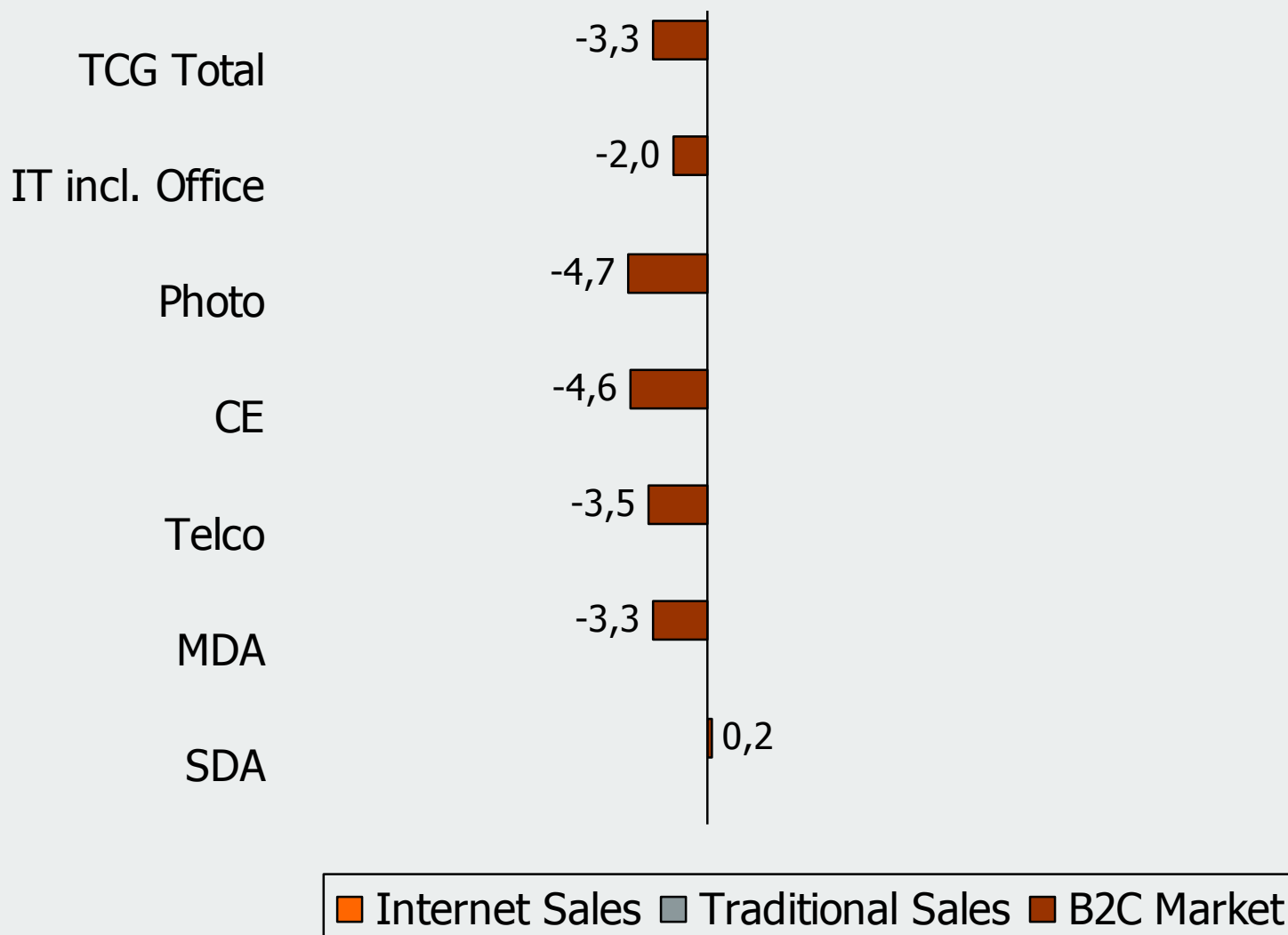
2.) CE, MDA, SDA, TC, IT, OE, Photo,

11 Countries Europe¹

Growth, Value % / Jan-Dec 2009

Technical Consumer Goods²

Internet Sales B2C



■ Internet Sales ■ Traditional Sales ■ B2C Market

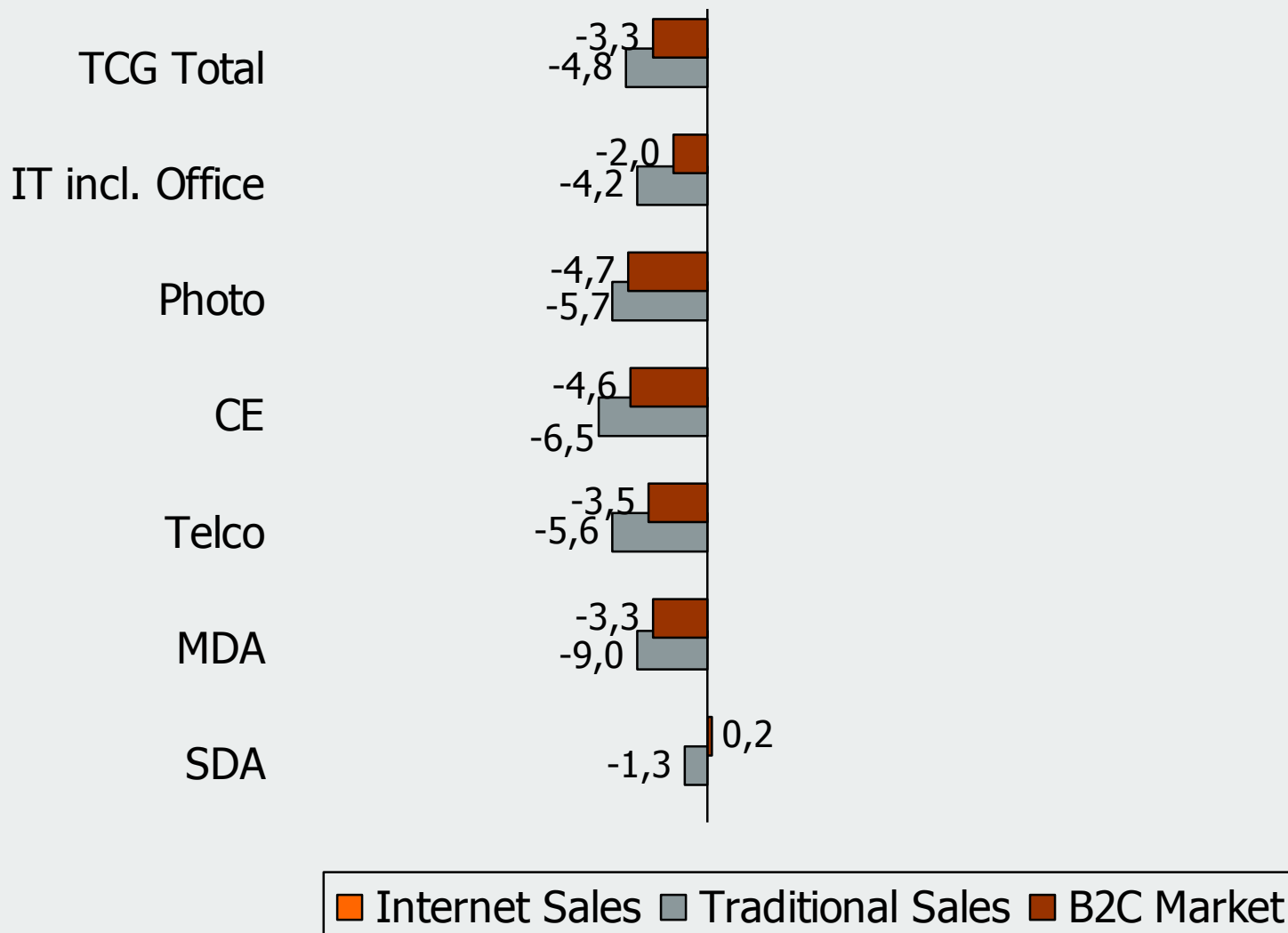
11 Countries Europe¹

Growth, Value % / Jan-Dec 2009

Technical Consumer Goods²

Internet Sales B2C

16

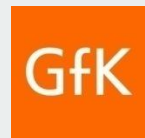
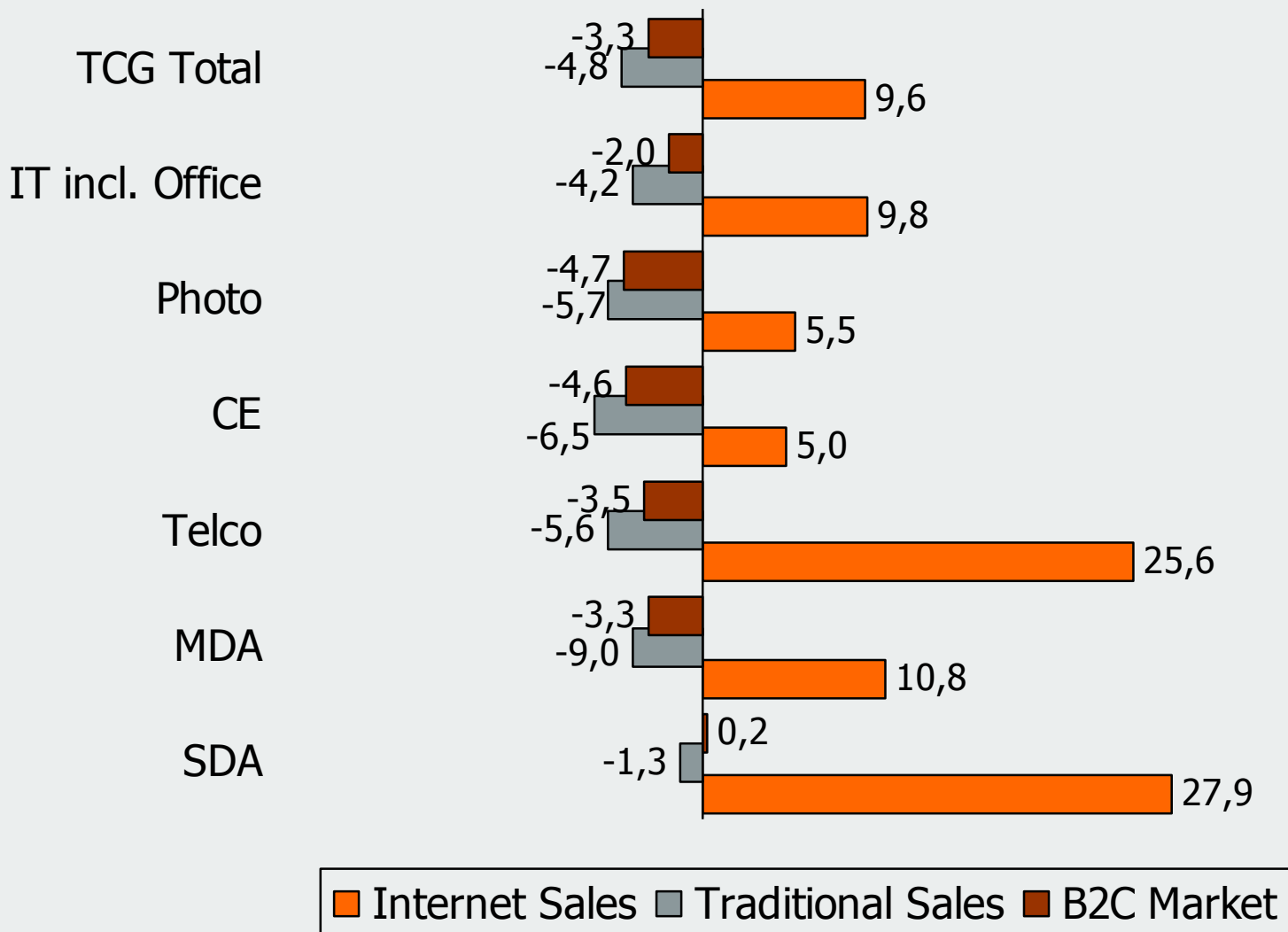


11 Countries Europe¹

Growth, Value % / Jan-Dec 2009

Technical Consumer Goods²

Internet Sales B2C



Summary

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Traditional Sales: Organized channels have been gaining shares.

In average every tenth Euro spent on Technical Consumer Goods in Europe today is spent with a mouse click. Internet Sales play an important role in the mind set of the consumer.

The Internet Sales Share is growing! Growth rates are still very high but slowing down due to a rising basis. The ceiling is by far not reached yet.

In Romania the Internet penetration rate is below the European average but it is in Top 10 Internet countries by number of users.



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Thank you for your attention!